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## Cruise Lines or the Islands: Who is Getting the Top Dollars Out of World Travelers in the Caribbean?

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**CRUISE LINES OR THE  
ISLANDS :**

**WHO IS GETTING THE TOP  
DOLLARS OUT OF WORLD  
TRAVELERS IN THE CARIBBEAN?**

**BY: DANIEL JERUSALMI**

**TO: DR. SNYDER**

# **ABSTRACT**

This paper will discuss the current tourism situation in the Caribbean. The two main topics of analyses are the cruise lines and different islands in the Caribbean. The two areas will be presented separately and at the end they will be linked for analyses and conclusion with the help of graphs, charts and surveys.

Puerto Rico, Curacao, Jamaica, and Barbados are the Caribbean islands chosen for this project.

Within the cruise lines section, the paper will review the history of the industry, the reasons behind today's great success, and possible outlooks for the future.

The Caribbean Islands section in this paper will discuss the importance of tourism in the economy, government intervention and participation, and overall tourism infra structure of the islands.

There will be three surveys used in this project. The first, done by the Cruise Lines International Association, presents key statistical information on the Cruise Lines Industry, as well as information that serves as comparison for the cruise lines and other forms of vacations. The second survey, done by Price Waterhouse for the Florida-Caribbean Cruise Association, demonstrates the economic impact of the passenger cruise industry on the Caribbean. The third survey was done by myself with the intent of obtaining information on personal preferences of travelers when it comes to cruise lines or resorts in the Caribbean. I have also included a personal interview with an official from the Barbados Tourism Office.

# **THE CRUISE INDUSTRY**

## **HISTORY**

Beginning in the late 1930's, an effort was made by some steamship companies to operate a few cruises, but because this was a new concept, the public's reception wasn't the warmest. In the 1950's, immediately after World War II, there was a tremendous demand for transatlantic transportation. Families on both sides of the Atlantic wanted to be reunited. However, it was not until the second half of the 1950's that a substantial number of cruises out of New York were scheduled on a regular basis. Until that time, regular cruise programs were operated primarily out of Miami to the Bahamas and West Indies.

On May 3, 1951, Furness-Withy became the first shipline to operate a permanent weekly cruise program, from New York to Bermuda, with the ships Queen of Bermuda and Ocean Monarch. A notable feature of these ships was that all the staterooms were equipped with private bath and toilet facilities. Another exclusive cruise operation was initiated by Home Line. It operated a weekly cruise from New York to the Bahamas with a ship named Nassau. Eventually, Home Lines committed itself fully to operating weekly cruises to Bermuda and the Bahamas. (Steven B, 5)

The early cruises out of New York invariably were operated during the transatlantic off-season, in the winter months. The cruise season began at Christmas and lasted into March. The two and three week Christmas cruise and the February departures highlighted the season. These cruises were full of high fashion and social excitement, and prominent business people and professionals made up passenger lists. Cruises departed late at night, and this gave them a feeling of excitement and romance. Embarkation became a gala event and was marked by elegance and high spirits as passengers and friends arrived in a happy and festive mood. Newspaper reporters and photographers also were on hand to report on the rich and famous. A cruise experience was becoming a definite vacation attraction, even though the season generally was limited to the winter months. (Steven B, 5)

New, modern passenger transportation ships entered service in 1957, featuring comfort and convenience. Cabin Class was virtually eliminated. Tourist Class stateroom were upgraded extensively, and each stateroom included private facilities, thereby making them acceptable for cruising.

Among the leaders was Holland America Line with the new Statendam. Although this was built as a Tourist Class vessel in 1957, the quality of its accommodations was ideally suited for cruises. In 1959, the Rotterdam was introduced. It was a larger ship



with both First and Tourist Classes. Passengers could go from one class to the other by way of a unique, circular stairway. Home Lines was not far behind with their Oceanic, which began full time cruise service in 1965. (Steven B, 5)

During the next fifteen years, many of the passenger steamship companies could not make a successful transition to full time cruising. Some ships were unable to provide sufficient cabins with facilities, essential for attracting cruise clients. Operating costs were a major factor, also. Since cruising was a first class only type of operation, a higher quality of cuisine, service and entertainment had to be provided. To do so, additional work was required to furnish and sustain such high standards.

From the luxurious and romantic generation of North Atlantic passenger steamship companies and early cruise operators, only Cunard Line, Cunard/Norwegian American Line, Holland American Line and Home Line Cruises remain today. However, many vessels of that area are still operated under different names or by new owners all over the world. Some of them have been completely reformed, while others have undergone drastic renovations to improve their attractiveness. But, as the new generation of modern cruise ships enters service, the older vessels are slowly disappearing from the cruise scene. (Steven B, 5)

Until recently, the a cruise vacation was based on tradition. Now, cruising has entered a new era, in which the traditional offerings have been joined by new product concepts. The current cruise fleet, which operates principally in North America, numbers more than 140 ships.

## **THE INDUSTRY TODAY**

The cruise industry is the most exciting category in the entire leisure market. Since 1970, the industry has had a compound annual growth rate of 10% a year. The industry is also a young industry. In the past 25 years, an estimated 53 million passengers have taken a deep water cruise. Those are cruises that last a minimum of two days. Of this number, nearly 70% of the total passengers have been generated in the past 10 years. Nearly 40% of total passengers have been generated in the past five years alone. Those passengers have averaged one cruise vacation every two years. (CLIA)

The cruise market potential is huge. Over the next five years, the cumulative market potential for the cruise industry is \$50-\$90 billion. By the year 2000, the Cruise Lines International Association projects that as many as 7 million passengers per year will cruise.

The cruise product is incredibly diversified, with literally a cruise vacation for everyone. Over the past 10 years, the industry has responded to extensive market and consumer research. This research has led to the addition of new destinations, new ship design concepts, new on and off board activities, larger sports facilities, health centers, spas, modern looking lounges, a greater number of cabins with balconies, new cruise themes and new cruise lengths to reflect the changing vacation patterns of today's market.

According to the CLIA, cruising is an important vehicle for sampling destination areas to which passengers may return. Nearly 50% of all cruisers fully expect to return to the same destination for another type of vacation. These places benefit from tourists who shop, eat in their restaurants, utilize their beaches and water facilities, rent water sports equipment, and in most cases, recommend the location to other tourists who might eventually visit that same place. The Cruise Lines International Association also mentions that cruisers are not just cruisers, rather they are frequent vacationers who cruise as part of their vacation mix.

Whether a frequent or first time cruiser, the cruise experience consistently exceeds expectations on a wide range of important vacation attributes. On a comparative basis against other vacation categories, cruising consistently receives top remarks. Since the great majority of people who were once in a cruise are likely to return, the challenge of the industry is to convert cruise prospects into new cruisers.

The Caribbean is the number one destination in the industry, followed by Europe, Alaska, Trans Canal, Western Mexico, Bermuda and Trans Atlantic. The cruise industry has a very close working relationship with the travel agency community. An estimated 95-97% of all passengers are booked through travel agents. The Cruise Line Industry has 26 member lines and over 22,000 travel agency affiliates. (CLIA)

Considering the benefits of a cruise and what you get for your money, a cruise vacation is fairly inexpensive, very relaxing, and extremely pleasant. Cruises are also considered to be very safe. During the Gulf War, with the fear from terrorism in airports and airplanes, many travelers opted to take a cruise instead.

There are not many legal issues faced by the industry, but recently some hotels in the Caribbean are complaining that while they have to pay taxes and obey strict labor laws, cruise lines operate in an offshore world with few rules. The Cruise Lines Industry claims that they are only in the Islands for part of the day, so they shouldn't follow the same rules as if they were an established local business.

The industry's main form of advertising is through the travel agencies. They often distribute brochures and different literature on the company or on specific ships. These brochures or magazines have pictures of the ships, prices of cruises, dates of departures and arrivals, destinations, and additional information on the layout of each ship. They are a very complete and helpful guideline. Another source of advertising is through newspapers, magazines, radio and TV. However, one of the most effective ways of advertising for the industry is word of mouth advertising. When a friend or relative talks about the great time they had on a cruise, one becomes interested and might decide to go on one.

There are several cruise lines companies operating in the world, but none has had more success than Carnival Cruise Lines. The company is the major player in the industry. One of the main reasons for Carnival's success is the on going process of building new and improved ships. The newest addition to the fleet is the "Destiny". The ship will be the world's largest, accommodating more than 2,600 passengers.

"This ship is the culmination of everyone's wish list of what they would want in a ship," says Micky Arison, chairman of Carnival Corporation. One of the most distinctive features of the new ship is the balcony design for more than half of the 740 outside cabins. The balconies will be constructed of clear glass instead of metal, allowing better and unobstructed views.

Designed to be 30% larger than the line's next largest ship, the Destiny will feature a three-deck atrium with elevators, a dance club with 530 video monitors, the very first sports bar in a cruise ship, along with all the other features common to a modern cruise ship. The Destiny will truly be a floating city. This new trend in cruise lines, offering ships that can provide almost the same or better activities and features than the land based vacations, is bringing more and more cruisers to the industry every year. (Carroll, 3)

So far this year, Carnival Corp. has posted record profits and obtained high occupancy rates. The fleetwide occupancy of its four lines has increased by an unprecedented 7%. For the six months ending May 31, the company added 146,000 new passengers, an increase of 21% compared with the period last year. For the second

quarter alone, the company added 82,000 new passengers, amounting to a 23.2% increase over the same period in 1995. The performance boosted Carnival's earnings for the second quarter to \$106.3 million, an increase of 18.4%. (Blum, 1)

Micky Arison believes that the company took several steps in building for its future during 1995. According to him, contacts were signed to build four new ships during the year. " At the end of 1995, we had outstanding contacts for the construction of seven new ships at an estimated cost of \$2.1 billion. The company's growth strategy will continue as the primary strategic focus for the remainder of the decade. The Carnival Cruise Lines brand continues to be the leader among contemporary cruise brands. With the most modern fleet in the cruise industry, supported by mass-market consumer advertising, Carnival has become the most recognized cruise brand in North America. As we enter the second half of the 1990s, we expect that the cruise industry as a whole will continue to grow and prosper. " (Annual Report)

# I. CRUISE CAPACITY (Continued)

## 2. 1995-1999 SHIP ADDITIONS

Based on public information, a total of 31 new ships are contracted or planned to be added to the North American fleet by 1999.

The following summarizes all the information as of the date of publication. Ships under "contract" are self-explanatory: "Planned" ships have been announced but we have no confirmation of a contract being signed.

1995						
	ADDITION OR DELETION	DELIVERY DATE	SHIP NAME	# OF LOWER	CONTRACT OR PLANNED	NEW OR USED
AMERICAN HAWAII CRUISES	10-entire svc. 4/97	8/95	CONSTITUTION	-784	C	U
AMERICAN HAWAII CRUISES	A	8/95	INDEPENDENCE	65	C	U
CARNIVAL CRUISE LINES	A	7/95	IMAGINATION	2,021	C	N
CELEBRITY CRUISES	A	11/95	CENTURY	1,750	C	N
COMMODORE CRUISE LINE	A	12/95	ENCHANTED ISLE	729	C	U
COMMODORE CRUISE LINE	D	12/95	ENCHANTED SEAS	-708	C	U
COSTA CRUISES	A	9/95	COSTA PLAYA	486	C	U
CRYSTAL CRUISES	A	5/95	CRYSTAL SYMPHONY	934	C	N
CUNARD CROWN	D	1995	CROWN JEWEL	-798	C	U
CUNARD CROWN	D	1995	CUNARD PRINCESS	-775	C	U
CUNARD EUROPAMERICA	D	11/95	DANUBE PRINCESS	-192	C	U
CUNARD EUROPAMERICA	D	11/95	PRUSSIAN PRINCESS	-140	C	U
CUNARD EUROPAMERICA	D	11/95	PRINCESSE DE PROVENCE	-140	C	U
CUNARD EUROPAMERICA	D	11/95	MOZART	-208	C	U
CUNARD EUROPAMERICA	D	11/95	DRESDEN	-112	C	U
DELTA QUEEN STEAMBOAT CO.	A	8/95	AMERICAN QUEEN	436	C	N
DOLPHIN CRUISE LINE	D	12/95	DOLPHIN IV	-569	C	U
EPIROTIKI CRUISE LINES	A	4/95	OLYMPIC	950	C	U
EPIROTIKI CRUISE LINES	D	12/95	ODYSSEUS	-501	C	U
EPIROTIKI CRUISE LINES	D	12/95	NEPTUNE	-167	C	U
EPIROTIKI CRUISE LINES	D	12/95	WORLD RENAISSANCE	-429	C	U
EPIROTIKI CRUISE LINES	D	12/95	HOMERIC	-868	C	U
EPIROTIKI CRUISE LINES	D	12/95	JASON	-271	C	U
NORWEGIAN CRUISE LINES	D	1/95	SOUTHWARD	-752	C	U
NORWEGIAN CRUISE LINES	D	10/95	STARWARD	-758	C	U
NORWEGIAN CRUISE LINES	A	10/95	LEEWARD	948	C	U
PEARL CRUISES	D	1995	MERMOZ	-530	C	U
PEARL CRUISES	D	9/95	PEARL	-486	C	U
PREMIER CRUISE LINES	D	2/95	MAJESTIC	-760	C	U
PRINCESS CRUISES	D	10/95	FAIR PRINCESS	-890	C	U
PRINCESS CRUISES	A	12/95	SUN PRINCESS	1,950	C	N
ROYAL CARIBBEAN CRUISE LINE	D	3/95	NORDIC PRINCE	-1,012	C	U
ROYAL CARIBBEAN CRUISE LINE	A	4/95	LEGEND OF THE SEAS	1,804	C	N
ROYAL CRUISE LINE	A	1/95	QUEEN ODYSSEY	212	C	U
SILVERSEA CRUISES	A	1/95	SILVER WIND	296	C	N
SUN LINE CRUISES	D	12/95	STELLA MARIS	-178	C	U
SUN LINE CRUISES	A	12/95	ODYSSEUS	400	C	U
WORLD EXPLORER CRUISES	D	12/95	UNIVERSE	-440	C	U
CLIA TOTAL				533		
AMERICAN WEST STEAMBOAT CO.	A	7/95	QUEEN OF THE WEST	183	C	N
NON-CLIA TOTAL				163		
1995 GRAND TOTAL				696		

# **I. CRUISE CAPACITY** (Continued)

## **2. 1995-1999 SHIP ADDITIONS (Continued)**

1996						
	ADDITION OR DELETION	DELIVERY DATE	SHIP NAME	# OF LOWER	CONTRACT OR PLANNED	NEW OR USED
CARNIVAL CRUISE LINE	A	4/96	INSPIRATION	2,021	C	N
CARNIVAL CRUISE LINE	A	1996	CARNIVAL DESTINY	2,600	C	N
CARNIVAL CRUISE LINE	D	5/96	FESTIVALE	-1,102	C	U
CELEBRITY CRUISES	A	11/96	GALAXY	1,820	C	N
COSTA CRUISE LINE	A	8/96	COSTA VICTORIA	1,950	C	N
CUNARD LINE, LTD.	D	9/96	SAGAFJORD	-530	C	U
DOLPHIN CRUISE LINE	A	5/96	ISLAND BREEZE	1,102	C	U
HOLLAND AMERICA LINE	A	4/96	VEENDAM	1,266	C	N
NORWEGIAN CRUISE LINES	A	3/96	NORWEGIAN CROWN	1,040	C	U
PRINCESS CRUISES	D	12/96	GOLDEN PRINCESS	-830	C	U
ROYAL CARIBBEAN CRUISE LINE	A	3/96	SPLENDOR OF THE SEAS	1,804	C	N
ROYAL CARIBBEAN CRUISE LINE	A	11/96	GRANDEUR OF THE SEAS	1,950	C	N
ROYAL CRUISE LINE	D	3/96	CROWN ODYSSEY	-1,040	C	U
ROYAL CRUISE LINE	D	10/96	STAR ODYSSEY	-775	C	U
WORLD EXPLORER CRUISES	A	7/96	ENCHANTED SEAS	708	C	U
CLIA TOTAL				11,984		
1996 GRAND TOTAL				11,984		

1997						
	ADDITION OR DELETION	DELIVERY DATE	SHIP NAME	# OF LOWER	CONTRACT OR PLANNED	NEW OR USED
AMERICAN HAWAII CRUISES	re-enter svc.	4/97	CONSTITUTION	764	C	U
CELEBRITY CRUISES	A	11/97	CONSTELLATION	1,820	C	N
COSTA CRUISES	A	1997	COSTA OLYMPIA	1,950	C	N
HOLLAND AMERICA LINE	A	6/97	UNNAMED	1,318	C	N
PRINCESS CRUISES	A	1997	DAWN PRINCESS	1,950	C	N
ROYAL CARIBBEAN CRUISE LINE	A	4/97	RHAPSODY OF THE SEAS	2,000	C	N
ROYAL CARIBBEAN CRUISE LINE	A	9/97	ENCHANTMENT OF THE SEAS	1,950	C	N
RADISSON SEVEN SEAS	A	12/97	UNNAMED	320	C	N
CLIA TOTAL				12,072		
1997 GRAND TOTAL				12,072		

1998						
	ADDITION OR DELETION	DELIVERY DATE	SHIP NAME	# LOWER	CONTRACT OR PLANNED	NEW OR USED
CARNIVAL CRUISE LINES	A	1998	UNNAMED	2,021	C	N
CARNIVAL CRUISE LINES	A	1998	UNNAMED	2,021	C	N
CARNIVAL CRUISE LINES	A	1998	UNNAMED	2,600	C	N
PRINCESS CRUISES	A	1998	GRAND PRINCESS	2,600	C	N
ROYAL CARIBBEAN CRUISE LINE	A	4/98	VISION OF THE SEAS	2,000	C	N
SILVERSEA CRUISES	A	1998	UNNAMED	396	P	N
CLIA TOTAL				11,638		
DISNEY CRUISES	A	1/98	DISNEY MAGIC	1,740	C	N
DISNEY CRUISES	A	12/98	UNNAMED	1,740	C	N
NON-CLIA TOTAL				3,480		
1998 GRAND TOTAL				15,118		

1999						
	ADDITION OR DELETION	DELIVERY DATE	SHIP NAME	#LOWER	CONTRACT OR PLANNED	NEW OR USED
SILVERSEA CRUISES	A	1999	UNNAMED	396	P	N
CLIA TOTAL				396		
1999 GRAND TOTAL				396		

SOURCE: CLIA Five Year Capacity Analysis

# **THE ECONOMIC IMPACT OF THE CRUISE INDUSTRY IN THE CARIBBEAN**

The Caribbean is the world's most popular cruise line destination. Price Waterhouse conducted a survey in which cruise passengers and cruise employees determined their economic contribution to the Caribbean islands.

The passengers and crew of the following cruise lines were surveyed:

- Carnival Cruise Lines
- Commodore Cruise Line
- Crown Cruise Line
- Dolphin Cruise Line
- Majesty Cruise Line
- Premier Cruise Lines
- Royal Caribbean Cruise Line
- Celebrity Cruises
- Costa Cruise Lines
- Cunard Line
- Holland America Line
- Norwegian Cruise Line
- Princess Cruises
- Seawind Cruise Line

The following Caribbean ports were included in the survey:

- Aruba
- Bahamas
- Barbados
- Curacao
- Key West
- Montego Bay
- Ocho Rios
- San Juan
- St. Kitts
- St. Thomas

Passengers and crew members spend millions of dollars each year in the ports that they visit. These expenditures produce a direct flow of funds into the local economies and create jobs, wages and salaries for employees in the Caribbean region. They spend money on items such as food, beverages, gifts, entertainment, gambling, communications, transportation and sightseeing.

Here is the average expenditure per passenger at selected Caribbean ports in 1995:

- Aruba	\$65
- Bahamas	\$83
- Barbados	\$61
- Curacao	\$63
- Key West	\$41
- Montego Bay	\$57
- Ocho Rios	\$101
- San Juan	\$158
- St. Kitts	\$47
- St. Thomas	\$255
- Average	\$ 124

St. Thomas and San Juan have a much higher average because they are premier shopping locations and provide great bargains duty free.

Here is the average crew expenditure per visit in the Caribbean ports:

- Aruba	\$47
- Bahamas	\$63
- Barbados	\$33
- Curacao	\$60
- Key West	\$94
- Montego Bay	\$72
- Ocho Rios	\$26
- San Juan	\$93
- St. Kitts	\$20
- St. Thomas	\$73
- Average	\$66



The total expenditures by passengers and crew in 1995 are as follows:

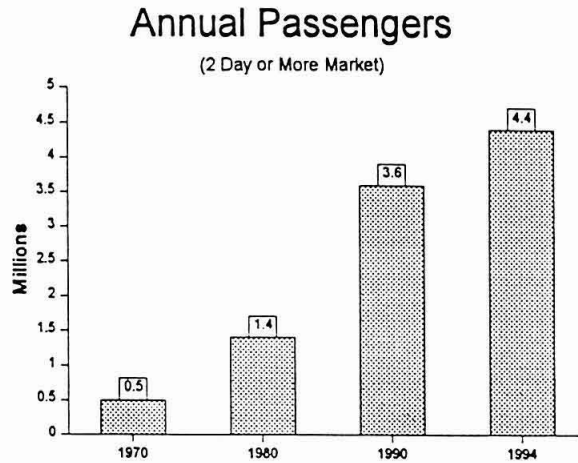
	(US\$ millions)
cruise passengers	\$2,059
cruise line employees	\$ 251
total Caribbean expenditures	\$2,310

## A. RECENT MARKET/GROWTH STATISTICS

### 1. OVERALL PASSENGER GROWTH-NORTH AMERICAN CRUISE MARKET

The cruise industry is the most exciting vacation category in the United States and Canada. Its average rate of growth has been far greater than any other category.

#### THE BIG PICTURE



#### RECENT GROWTH TRENDS

	Annual Passenger Growth
	Actual (000's)
1980	1,431
1981	1,453
1982	1,471
1983	1,755
1984	1,859
1985	2,152
1986	2,624
1987	2,898
1988	3,175
1989	3,286
1990	3,640
1991	3,979
1992	4,136
1993	4,480
1994	4,448
Average Growth Rate 1980-1994	+ 8.6%

SOURCE: CLIA Passenger Carrying Reports-adjusted to 100% of cruise lines for passengers marketed/sold from North America

**A. RECENT MARKET/GROWTH STATISTICS**  
(Continued)

**2. GROWTH BY LENGTH OF CRUISE-NORTH AMERICAN MARKET**

Reflecting North America's shorter vacation patterns, the cruise industry's hottest growth category has been the 2-5 day cruise category.

**PASSENGERS:**

	Passengers (000's)		% Growth
	1980	1994	
2-5 Days	347	1,691	+ 387.0
6-8 Days	846	2,318	+ 174.0
9-17 Days	221	421	+ 90.0
18+ Days	17	18	+ 0.6
<b>TOTAL</b>	<b>1,431</b>	<b>4,448</b>	<b>+ 211.0</b>

**SHARE:**

	Category Shares		% Point Change
	1980	1994	
2-5 Days	24.3%	38.0%	+ 13.7
6-8 Days	59.1	52.1	-7.0
9-17 Days	15.4	9.5	-5.9
18+ Days	1.2	0.4	-0.8
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>± 0.0</b>

**SOURCE:** CLIA Passenger Carrying Reports-adjusted to 100% of cruise lines.  
CLIA's data does not include one day cruises.

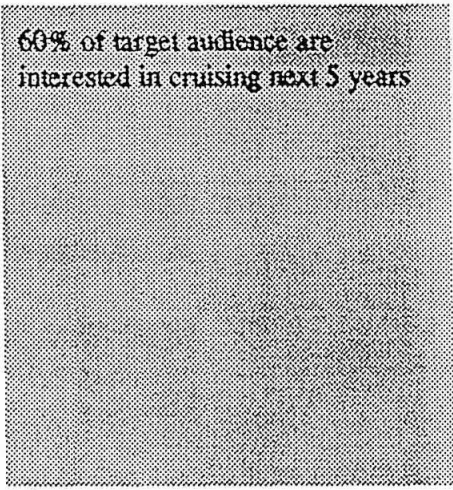
**B. EXISTING MARKET POTENTIAL**  
(Continued)

The existing cumulative market potential over the next five years could be as high as \$87 billion based on individuals who express some degree of interest in cruising. This is an increase of 14.4% from 1992 when the potential was \$76 billion.

**Future Potential Next 5 Years\***

\$87 Billion<sup>1</sup>

60% of target audience are  
interested in cruising next 5 years



\$54 Billion<sup>2</sup>

37% definitely/probably will



\*Target audience does not include: children under 18, 18-24 year olds, retirees.

<sup>1</sup>71,280 million people x cost for the average cruise [6.1 days x \$200 per diem].

<sup>2</sup>43,956 million people x cost for the average cruise [6.1 days x \$200 per diem].

## B. MARKET POTENTIAL

### 1. CALCULATION METHODOLOGY

Consistent with past data, 60% of the target population (25 years or older, household income +20m per year) reports that they are interested in taking a cruise. Even more encouraging is the fact that over one-third of the target population report that they intend to actually take a cruise within the next five years and most of these prospects are near term - 75% of prospects intend to cruise within the next two years.

#### Future Potential Next 5 Years

##### # Of People Among Target Audience

Interested In Cruising  
Next Five Years<sup>1</sup>

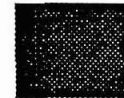
71,280M



60%

Definitely/Probably will  
Cruise Next Five Years<sup>1</sup>

43,956M



37%

\*Target audience from sample definition (118,800M)

<sup>1</sup>Based on total respondents

# **LEGAL ISSUES**

## **Port Charges**

A travel agency has filed suit against the Cruise Lines charging several companies with failing to pay commission on port charges. James Godsmann, president of the Cruise Lines International Association and other industry figures said the suit is without merit. The action was filed in the Los Angeles Superior Court, following similar class-action suits filed in state courts in Florida, California, and Washington last April. Those suits claimed seven cruise lines overcharged passengers by inflating port fees.

The lines accused of such action are Royal Caribbean, Princess, Norwegian, Carnival, Celebrity, Holland America and Renaissance. NGL, the small agency out of New Jersey that filed the suit, is seeking other agencies to join the class action. According to James Johnson, the lawyer representing NGL, each passenger paid an average of \$100 in port charges that were not truly port charges, but were profits that ended up with the defendants. Jeff Greenfield, a partner in NGL, called port charges a "Marketing ploy" in which cruise lines present a low base fare to consumers and then inflate port charges after the cruise is booked. He adds: "It is incumbent on the cruise lines to come clean and bare all and show what their port charges represent. They have an obligation to the industry." (Carroll, 25)

In their defense, the cruise lines argue that for many years, they have included port charges as part of their tariffs and referred to them in their brochures. They also mention that the charges relate to a wide variety of fees that deal with season costs associated with numerous ports of call and vary according to itinerary. (Carroll, 25)

This issue can affect the cruise lines because if passengers believe that the money they are paying for port taxes is not actually all being used for that purpose, they might decide to go into a resort instead. Airport taxes and hotel taxes are much lower than the port fees.

## Medical Standards on Cruises

The American Medical Association adopted a resolution urging that standards be set for the medical care of passengers aboard cruise ships visiting U.S. ports. The resolution was voted on by the organization's House of Delegates, a quasi legislative body of 435 representatives that sets the AMA's policy on a variety of health issues.

The AMA noted that emergency medical care aboard cruise ships is not regulated, nor is there any credentialing of cruise ship physicians. As a result, according to the AMA, there is no assurance of enforcement of usual and customary public health practices on ships not of U.S. registry. The Association also said that many elderly persons as well as those with complex medical needs cruise to international destinations from U.S. ports, yet the emergency medical care available to such passengers is not what they would expect. (Blum, 45)

The AMA's resolution was drafted originally by the Florida Medical Association, many of whose members are concerned by the lack of regulation of medical care aboard ships based in Florida ports.

Cindy Collenda, president of the International Council of Cruise Lines, said her organization is conducting a comprehensive review of the guidelines for cruise ships adopted last September by the American College of Emergency Physicians (ACEP). She said, "We are happy to get any recommendations or comments from the AMA."

Dr. Robert Wheeler, the head of ACEP's Cruise Ship section, said that the U.S., Norway and the Great Britain have such guidelines for ships registered in their countries. The problem, however, are the ships that operate in U.S. ports but are registered in nations where the medical standards are much lower. (Blum, 45)

"You have to be prepared to take care of people with life-threatening conditions such as heart attack, stroke, respiratory failure, a serious allergic reaction, bleeding of any type and multiple injuries. If you have a well-equipped infirmary and a qualified staff, you can stabilize these people until you can get them off to land facilities," he said.

The cruise lines should take action before this becomes a government regulation, and proper quality care facilities on ships would be a positive reassurance for passengers.

This issue is important because if the public develops a bad image about medical standards on board cruise lines, some passenger might opt to take a different vacation than a cruise.

## **The Environment in the Caribbean**

The environment is one of the main issues currently faced by the Caribbean Tourist Organization. At conferences, workshops, forums and seminars, the importance of preserving the natural resources is a key theme. Jean Holder, secretary general of the CTO, speaking at the Annual Ecotourism Conference in Guadalupe, encouraged island officials to take immediate action to protect the environment. He said, " we must talk more about what happens when divers no longer come because the reefs have been destroyed or the beach disappeared because of some senseless construction." He also mentioned that the CTO is "well placed to assist in focusing strategy on the need to get the environment issue on the political agenda." (Myers, 19)

Dr. Bishnodat Persaud, director of the University of the West Indies Center for the Environment and Development, reminds that "although the Caribbean islands are not highly industrialized, environmental management on many of the islands poses a challenge due to population density, urbanization levels, oil tanker traffic and a dependence upon polluting industries." (Myers, 19)

This issue is one of crucial importance to the cruise lines and to all Caribbean islands. Tourism is the number one provider of jobs in the area, and the local economies would collapse if the number of tourists decreased dramatically.

The beautiful environment, highlighted by the beaches and the ocean, is the main reason why visitors go to the Caribbean every year. If the environment is destroyed and the white sand beaches of the islands become polluted, there will definitely be a decline in the number of tourists. In the past, there have been documented cases of cruise lines dumping garbage into the ocean. After heavy fines and a strong negative public response, the ships now appear to throw their garbage in the proper designated areas on shore.

Especially nowadays when the entire world is becoming more sensitive to the environment, where laws are becoming stricter and most of the population seems to care about preserving the natural beauties that are left in this world, it is a must for cruise lines and for the governments in the islands to do anything in their power to ensure that the Caribbean will remain a beautiful attraction for millions of people for many years to come.



# CURACAO

Curacao was discovered in 1499 by Alonso de Ojeda, a lieutenant of Christopher Columbus. The official languages are Dutch and Papiamentu, but English and Spanish are also widely spoken. Curacao is a small island with a population of only 145,000.

In the 20th century the economy prospered with the discovery of oil in Venezuela, only 35 miles from Curacao. The Dutch-British Shell oil company decided to set up a refinery on the island because of its political stability and its good port facilities. After World War II, Curacao received its independence from the Netherlands. In 1982, the shell refinery shut down and many were left unemployed. Curacao started then to focus on tourism as a substantial source of income. (Curacao Homepage)

The Curacao Tourism Development Bureau has developed a master plan with the ultimate goal of doubling its number of visitors by 2010. The plan calls for the construction of new hotels, improvement of existing hotels, and new air service. The program will also be combined with an island wide infra-structure development program.

According to Pieter Sampson, executive director of the bureau, the island's room count would grow from 1,800 units to 3,560 units by 1999. The increase would add some 1,000 hotel jobs, and indirectly would employ from 1,500 to 3,000 additional workers. (O'meara, 3)

Over the past 30 years, Curacao has not been one of the main Caribbean tourist destinations. Several international hotel chains decided to leave the island after labor conflicts and social unrest caused visitor numbers to drop significantly in the late 1960's.

During the 1970's, there was a lack of government support. The banking and industry were booming, so government officials concentrated their efforts in those industries. In the 1980's, however, the government privatized the tourist board, and became more supportive of tourism. (O'meara, 3)

The initial come back happened with the opening of the Sonesta Beach Hotel and Casino, the island's first five-star property. Aggressive marketing combined with more charter flights in 1994, ultimately led to a 45% increase in visitors from North America. That represented the highest increase that year in that market for any Caribbean island. (O'meara, 3)

Several hotel developments currently are under way, and the Curacao government is negotiating a possible deal with Hyatt Resorts Caribbean. Sampson believes the addition of these properties would help to promote the island. Beyond its need for hotel rooms, Sampson said, the island requires a golf course to attract different markets, such as the meetings and incentives sector.

While the master plan calls for a mix of large and small properties, the report suggests that the majority should be 60 to 150 room hotels that cater to specific niches.

# PUERTO RICO

Puerto Rico was discovered by Christopher Columbus in 1493. The island is now a Commonwealth of the United States and maintain two official languages, Spanish and English. San Juan is the city capital and the population at the end of 1995 was around 4 million people.

Puerto Rico was the big winner in the Caribbean last year in terms of visitor increases, posting a 14.1% jump over 1994 visitor figures, according to the nation's latest tourism statistics. Manuel De Juan, executive director of the Puerto Rico Tourism Co., attributes the increase to a number of factors. These factors date back to a number of key strategies that were developed in the past several years by the Puerto Rico Hotel and Tourism Association, the Convention Bureau and the Tourism Co. De Juan says, "each entity has its own mission statement and set of responsibilities that have spawned a volume of marketing and promotional activities from which the destination as a whole is now benefiting." (Myers, 22)

Another key factor for Puerto Rico's recent success is the government's commitment to tourism investment. According to De Juan, the tourism budget has doubled in the last two years, which indicates that the administration has placed a priority focus on tourism development. Figures from the government indicate that the budget for the current year is \$41 million, a 15% increase over last year's budget. This substantial growth is due in large part to increased marketing efforts in the United States with campaigns that position Puerto Rico as a diverse and exciting place.

By the end of the next year, Puerto Rico expects to have the highest concentration of chain hotels in the Caribbean. In the past, one of the concerns of tourists that visited Puerto Rico was safety, but that seems to not be a problem any longer. Due to a bigger and more effective police force, more street patrols in tourist areas and reinforcement at ports of entry, the island has not had a case of violent crime against tourists for several years. (Myers, 22)

# JAMAICA

Jamaica became a British colony in 1655 when the English captured it from the Spaniards. The official language is English, but many Jamaicans speak patois, a mixture of English and African forms of words from different places. The majority of the population is Christian, and Jamaica is known for its sugar plantations, coffee, rum, beautiful beaches and Reggae music. (Destination Jamaica, 24)

Tourism is the key to Jamaica's economy. The island has rapidly become a prime destination for beach lovers, fishermen, scuba divers and watersports enthusiasts. Expansion and growth are common in every tourist area.

Promotional efforts and an improved product helped boost visitor numbers from the United States by 5.1% in 1995. The destination also registered an increase of 4.4% in overall stopover visitor arrivals last year, and earnings increased to \$965 million, an increase of 5% over the previous year. (O'meara, 24)

"We did a lot of promotions last year and embarked on a number of new activities that seem to have borne fruit," Fay Pickersgill, director of tourism for the Jamaica Tourist Board, said. The island's exposure in the United States has been increased because of a larger amount of television ads.

In 1995, Jamaica also added 600 hotel rooms. The total number stands now at 20,000 units, and another 900 rooms are expected to be constructed by the end of 1996. The cruise ship pier in Ocho Rios is being extended to accommodate larger vessels, and that will also be a factor in the local tourism industry. (O'meara, 24)

Even though the number of visitors to the island has increased, the high occurrence of local crime is a major concern of travelers. Jamaica is not a very safe place, and that serves as a big competitive disadvantage against other islands like Barbados and Curacao. In Jamaica, tourists are advised to not wonder around the city at night and to not leave the hotels alone.

Because of the crime issue, there has been a great incoming of younger tourists to the islands. While all inclusive resorts are not that much affected by crime because the guests stay in the hotel all the time, other hotels around the cities have noticed a trend of college students and younger people as their guests. This happens because college students are more willing to take risks and they don't have children or family members to worry about. They also come in groups, which makes it safer to tour the cities at night. For the first time in its history, Jamaica has now become the number one destination of college students during their respective Spring Breaks.

# BARBADOS

Barbados is the most easterly of the Caribbean islands, being considered the gateway to the West Indies. The island has over 300 years of British heritage and this year, 1996, is celebrating 30 years of independence. It is the third oldest parliamentary in the Western Hemisphere. Barbados has a literacy rate of 98% and is consistently ranked by the United Nations as one of the top countries in terms of living standards. (Barbados, 10)

Hotel restorations, the marketing of smaller properties and the institution of a national tourism policy are priority items on the agenda set by Billie Miller, the Prime Minister of Barbados, who also serves as the minister of foreign affairs, tourism and international transport. The renovation of historical sites is also part of the development plan to increase tourism in the area.

"I want a national tourism policy that is structured in a way we've never had before," she says. "I want the policy to link tourism and international transport, tourism and culture, tourism and international trade and business. I want to use the minister's post as a vehicle to rehabilitate the towns of Barbados, to set the environmental balance right, to bring a harmony between tourism and all sectors of the economy and to lead Barbados into the 21st century." (Myers, 36)

Since Miller was appointed to office, the improved results are very clear. According to the nation's statistics in tourism for 1995, there was a 3.9% increase in overnight visitors and a 5.5% increase in cruise traffic compared to the 1994 figures. Last year's overnight and cruise passenger figures totaled close to 1 million visitors for the first time ever. (Myers, 36)

One of the reasons for Barbados increased success, according to Miller, is the fact that Barbados is now able to offer its visitors a host of options and a variety of activities that are suited to many different markets. "Our beaches have always been a strong drawing card, but we now have top class golf courses, we have heritage tours which are growing by leaps and bounds, we are fast developing our eco-tourism offerings, and there is much interest in our historic homes, sites and our Bajan culture," she adds.

Bernard Frost is an official from the Tourism Office of Barbados. In an interview conducted at his office, he talked about tourism in the island and what has been done to make Barbados one of the Caribbean top destinations.

"Recently, tourism has overcome agriculture as the number one source of foreign exchange earnings. The tourism industry survives predominantly with the markets of

Europe and North America. Within North America, 75% of visitors come from the United States and the majority of European tourists comes from the United Kingdom. Up until 1993, the percentage of visitors from both sides of the Atlantic was even at 50%. In the last three years, however, Europe has overtaken the US as the number one source of tourists, but corrective steps have been made in order to bring that scenario back to even flow of tourists. The number of tourists that visit the island yearly is around 1.1 million. Six hundred thousand come in with the cruises, while 500,000 stay overnight in hotels and resorts. "

"The government is responsible for the entire funding of the tourism industry and the marketing and promotion of Barbados as a tourism destination. Barbados is certainly one of the nicest islands of the Caribbean. It is rich in history, it is very clean, very safe, very quiet and the people are very friendly. The public transportation is good, and since the island is very small, there are easy accesses to any location. The beaches are very nice and pretty, and since Barbados is a flat island, the beaches are very long. There is also a great variety of beaches, that allows for different tourists' needs. Some beaches have very calm waters and are good for snorkeling, diving, and other water sports. Some other are rougher, and are good for surfing and wind surfing."

"When it comes to the age of our tourists, Barbados has been able to attract a very good mix of people. We have families, honeymoons, young couples, single adults, college students, it is truly a nice mix. One of the main elements that determines how good of a tourist destination a place is the number of repeat visitors that it gets, and Barbados ranks among the top of that list, with over 40% repeat visitors. We are also benefiting from the fact that unlike islands such as Puerto Rico, we haven't had a hurricane for 51 years. Not only tourists come here because they know they will be hurricane free, but we also get the business from tourists that initially were going to other islands but because of weather conditions had to reschedule their plans."

"The newest tourist attraction is a very exclusive villa community that has as its centerpiece a brand new golf course. There is also a new marina being built in the north of the island, as well as an addition to the port that will help accommodate more ships.. We have just built a state of the art facility that is now the largest conference facility in the Caribbean, and we are trying to develop Barbados also as a business destination for meetings, forums and conferences. This facility has been holding several United Nations' meetings and will hold a Tourism Convention in September. We have been attracting some big companies to use our facilities for their meetings, and as a result they get to know the island. We believe that in the near future, when those people that were here for business purposes decide to go on vacation in the Caribbean, they will choose us over other islands."

"One of our main goals at the moment is to convert the visitors that come in with the cruise lines into long stay arrivals, so that next time they come in they will stay a week or so in our hotels and resorts. We are also trying to encourage people that prefer to go on cruises, that they can fly to Barbados, stay here a day or two and they board the ship from our island. This will be very important because we believe that the cruise lines nowadays want their passengers to stay on board as much as possible. That is why they are building bigger and better ships with more facilities and activities on board. If they could sail for four days and not stop anywhere, they would do it, because when the passengers stay on board, they buy drinks, they shop and they gamble on board. Fortunately for us, the money generated in our economy is about the same from tourists that come in via cruises or those that stay longer in the island. As a result of that, the government does not have to favor any side."



# **CONCLUSION**

Tourism generates the number one source of income in most Caribbean islands. The two forms of tourism analyzed in this project were cruises and vacation stays in Curacao, Puerto Rico, Jamaica and Barbados. The project shows that both cruises and island vacation are enjoying great success. However, it is possible to notice that the cruise line industry is the one who is definitely getting the top dollars out of world visitors to the Caribbean.

Curacao has developed a mater plan and expects to double its number of visitors by the year 2010. There was also a 455 increase in the number of visitors from North America in 1994. Puerto Rico's tourism is also on the rise, and the island scored a 14.1% increase in the number of visitors in 1995. Jamaica has also increased its number of visitors in 1995. The increase fro the year before was 5.1% among United States tourists. The island has also added 600 new rooms that year, and another 900 rooms are expected to be constructed by the end of 1996. Barbados registered a 3.9% increase from the previous year in the number of overnight visitors, and a better number is expected for this year.

The growth in the cruise industry is even greater. In the past 25 years, the compound annual growth rate has been 10%. Several new ships are being built every year. The number of passengers continues to increase, and the outlook for the future could not be better. The industry has successfully adapted to the trend of shorter vacation leaves, and the diversity found in cruise ships reflects the smaller boundaries that are being caused by globalization.

The two forms of tourism, contrary to what many people might think, are not necessarily 100% competitors. Cruising is an important vehicle for sampling destination areas to which passengers may return. According to the Cruise Lines International Association, nearly 50% of cruisers expect to return to the same geographical area for another type of vacation. The same is the case in an inverse scenario. many tourists who stay in resorts and observe several cruises arriving daily, build up the desire to someday take a cruise.

The following exhibits will help support the fact that the cruise industry is the undeniable leader in the leisure market.

Exhibit D.1 demonstrates that cruising is the top-rated vacation category. Nine out of ten cruisers say that cruises are as good or better than other vacations.

Exhibit D.2 gives the 13 top reasons why cruising is a better vacation. Relaxation, pampering, the chance to see different geographical areas and the value for the money are in the top of the list.

Exhibit D.3 provides statistics for overall satisfaction and meeting expectations. The great majority of cruisers believe cruises provide great satisfaction and meets or exceeds expectations.

Exhibit D.4 provides numbers for cruise attributes and analyses the importance of those attributes versus its satisfactions.

Exhibit D.5 compares cruising versus resort vacations by asking those who took both kinds of vacations in the last five years.

Exhibit D.6 determines the likelihood and timing of next a next cruise for passengers that are first time or frequent cruisers.

Exhibit E.1 provides statistical evidence that cruising is also a way of sampling destinations.



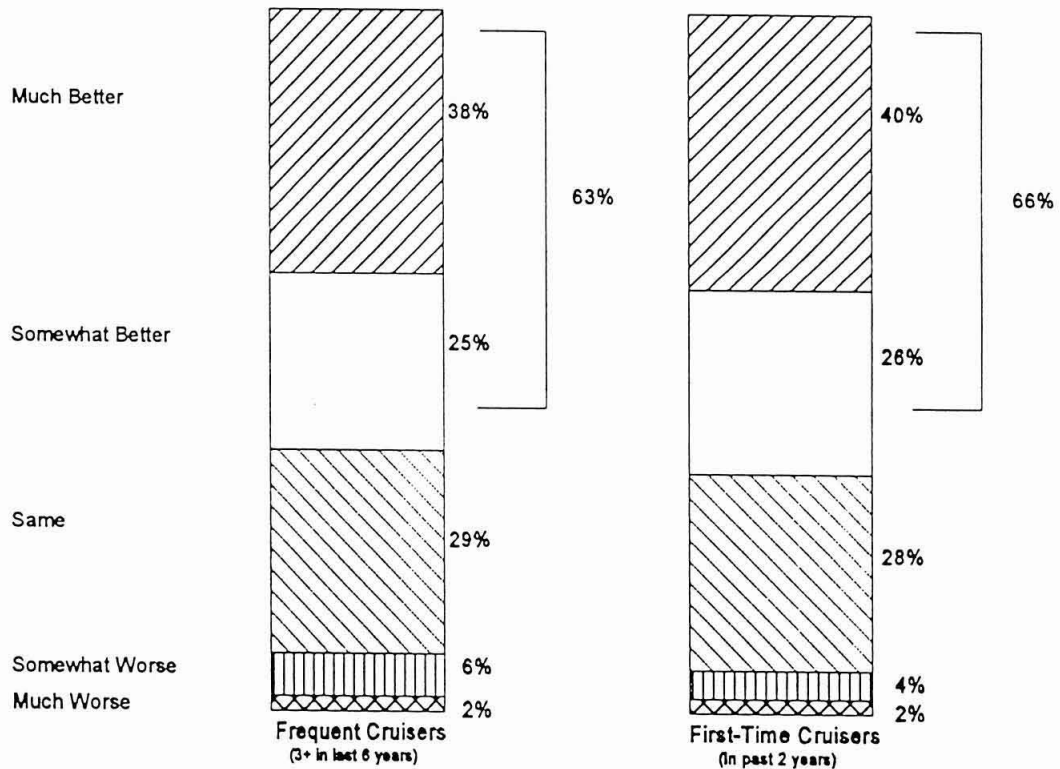
## D. CRUISES VS. OTHER VACATIONS

### 1. OVERALL COMPARISON WITH OTHER VACATIONS

Cruising is the top-rated vacation category. Whether first-time or frequent cruisers, the majority (63-66%) rate cruising as better than other vacation experiences.

#### Comparison of Cruise With Other Vacations

Nine out of Ten Say Cruises Are As Good or Better Than Other Vacations



## D. CRUISES VS. OTHER VACATIONS

(Continued)

### 2. CRUISING IS A BETTER VACATION FOR MANY REASONS

While relaxation, pampering, the chance to see different geographic areas, value for money and variety of activities are the top five reasons why cruising is rated as better than other vacation types, the total list of reasons is equally impressive.

	% AGREEING WITH STATEMENT	
	Frequent Cruisers*	First-Time Cruisers*
Allows you to relax and get away from it all	79	80
Allows you to be pampered	79	82
Gives you the chance to visit several geographical areas/destinations	78	75
Good value for the money	78	74
Offers a variety of activities	76	75
Good way to try out a vacation area that you might want to return to	75	73
A fun vacation	75	73
Allows you to do as much or as little as you want	74	71
Offers high quality entertainment	71	70
Offers comfortable accommodations	70	64
A way to meet interesting people	67	65
A learning experience	64	63
A romantic getaway	62	64

SOURCE: 1993 Cruising Dynamic Study

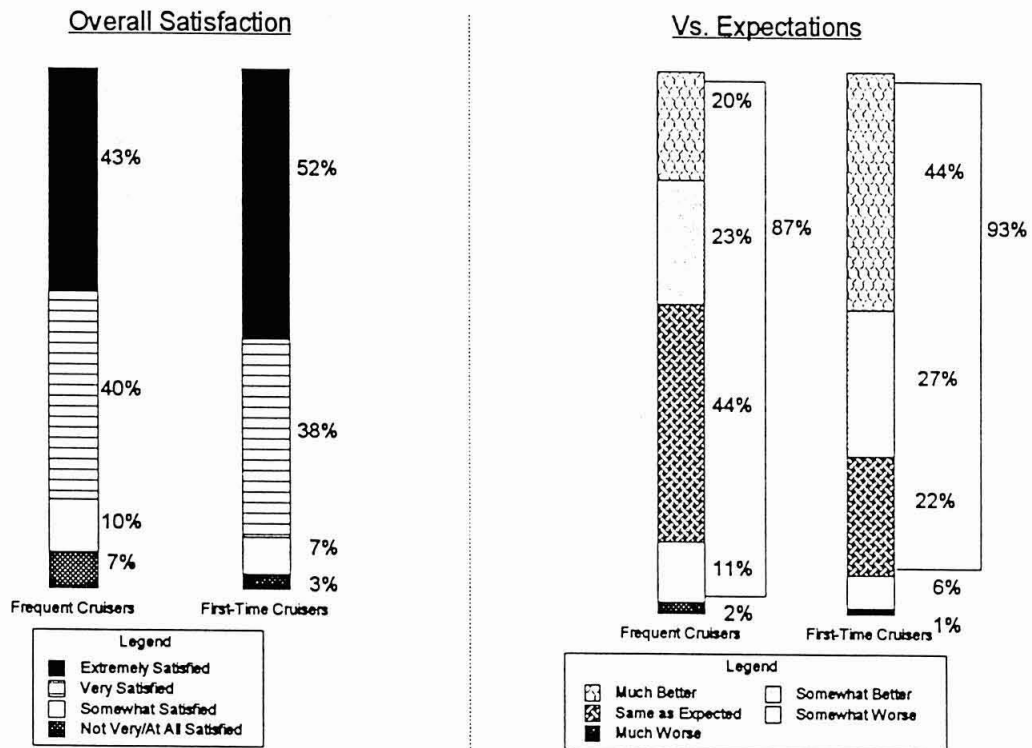
\* % agreeing cruising is better on a per attribute basis

**D. CRUISES VS. OTHER VACATIONS**  
(Continued)

**3. CRUISING-OVERALL SATISFACTION/MEETING EXPECTATIONS**

Both frequent and first-time cruisers, not surprisingly, provide excellent "satisfaction" and "met expectation" scores. Particularly impressive and encouraging for our industry is the fact that 71% of all first-time cruisers indicated their first cruise experience exceeded expectations.

**Satisfaction And Meeting Expectations**



SOURCE: 1993 Cruising Dynamic Study  
Frequent Cruisers: 3 or more in past six years  
First-time Cruisers: First experience within past 2 years

**D. CRUISES VS. OTHER VACATIONS**  
(Continued)

**4. CRUISE ATTRIBUTES: IMPORTANCE VERSUS SATISFACTION**

Expectations for the cruise experience are high, particularly in being a good value, in allowing you to do what you want, and in being fun and relaxing. In all areas cruising delivers on expectations, and, on many important dimensions is even better than expected. For first-time cruisers, in particular, whose in-going expectations for some aspects of the cruise experience are lower, the actual experience exceeds expectations in most categories. This explains why so many first-timers become repeaters.

	Importance vs. Satisfaction with Cruise Attributes					
	Frequent Cruisers			First-Time Cruisers		
	Importance* %	Satisfaction** %	Gap (±) %	Importance* %	Satisfaction** %	Gap (±) %
Allows you to do as much or as little as you want	85	87	+2	84	85	+1
Is a fun vacation	85	85	--	85	86	+1
Is a good value for the money	85	84	-1	83	82	-1
Allows you to relax and get away from it all	80	85	+5	83	86	+3
Offers comfortable accommodations	77	76	-1	71	78	+7
Gives you the chance to visit several different geographical areas/destinations	76	79	+3	69	76	+7
Allows you to be pampered	66	73	+7	52	77	+25
Offers a variety of activities	63	73	+10	61	77	+16
Offers high quality entertainment	56	65	+9	48	69	+21
Is a good way to try out a vacation area that you might want to return to	55	68	+13	62	72	+10
Is a learning experience	48	62 <sup>3</sup>	+14	52	68	+16
Is a way to met interesting people	47	58	+11	40	59	+19
Is a romantic getaway	39	51	+12	50	62	+12

\* Rated 4,5 on a 5-point scale where 5=extremely important and 1=not at all

\*\* Rated 4,5 on a 5-point scale where 5=extremely satisfied and 1=not at all satisfied

■ Statistically significant difference

SOURCE: 1993 Cruising Dynamic Study

**D. CRUISES VS. OTHER VACATIONS****(Continued)****5. CRUISING VS. RESORT VACATIONS**

Among people who have taken both a cruise vacation and resort vacation in the past five years, cruising rates exceptionally well on all key vacation descriptive characteristics.

	<b>Characteristics That Describe Cruises Versus Vacations Extremely Well*</b> <b>(Among those who took both in past five years, in descending order of net differences)</b>		
	<b>% Cruises*</b>	<b>% Resort Vacations*</b>	<b>(+/-) Net Difference</b>
Pampered by staff	62	30	+ 32
Well organized	66	34	+ 32
Festive	48	16	+ 32
Able to have pleasurable dining experiences	68	39	+ 29
A good value for the money	43	28	+ 15
Able to meet interesting people	47	32	+ 15
Hassle free	54	41	+ 13
Relaxing	68	57	+ 11
Safe	67	56	+ 11
Romantic	40	30	+ 10
Good way to try out vacation spot	53	46	+ 7
Active	37	30	+ 7

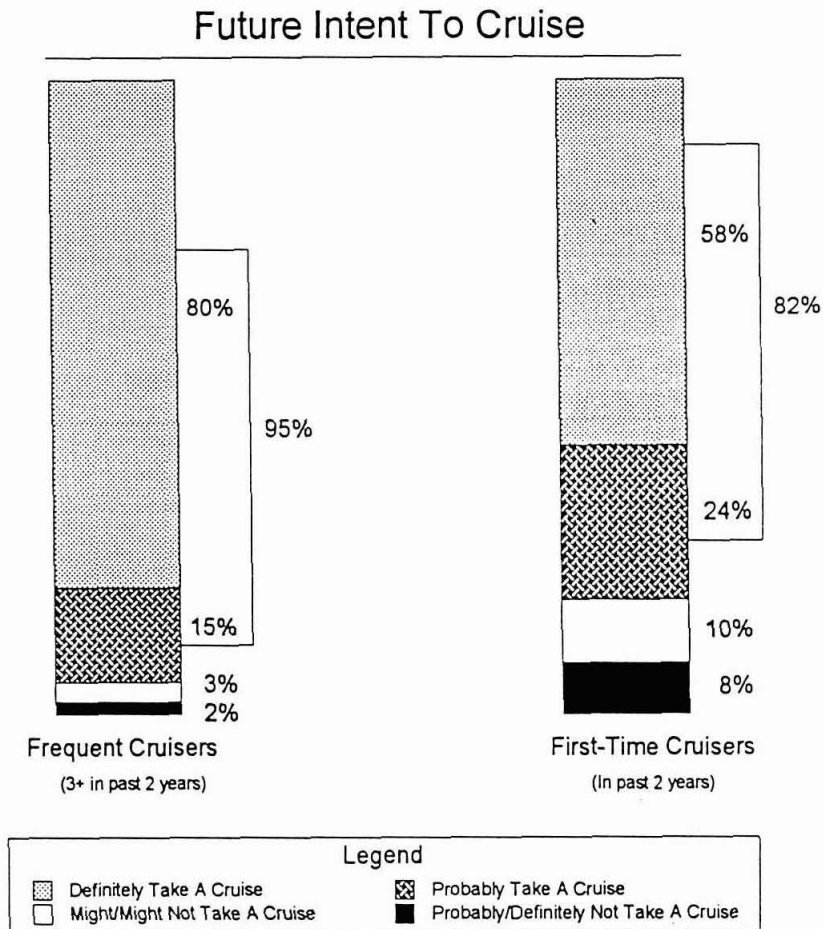
SOURCE: 1994 CLIA Market Profile Study

\* Top box agreement on a five-point scale

**D. CRUISES VS. OTHER VACATIONS**  
(Continued)

**6. LIKELIHOOD & TIMING OF NEXT CRUISE**

The positive cruise experience generates a high degree of interest in taking another cruise. First-timers express a remarkably high likelihood of cruising again. Frequent cruisers have shorter term plans with respect to when they will cruise again, but even first-time cruisers plan another cruise relatively soon. The majority of first-time cruisers plan to take another cruise within the next two years: the majority of frequent cruisers plan to cruise again within the next year.



## E. CRUISING-AS A MEANS OF SAMPLING DESTINATIONS

### 1. FUTURE VISITS

Cruising is seen by the large majority as a good way to sample a geographical area/destination for future vacations (85% of frequent cruisers and 88% of first-time cruisers). In fact, for more than half of all cruisers, an important consideration in choosing their particular cruise was to screen the geographical area/destinations they visited. And, after sampling the geographical area/destinations on their recent cruise, half say they will return for another type of vacation.

#### A. Among Frequent Cruisers

	Geographical Area/ Destination of Most Recent Cruise		
	% Total	% Caribbean	% All Other
<b>Agree With Statement:</b>  Cruising is a good way to try out vacation spots you may want to return to for a resort vacation	85	86	84
<b>Extremely/Very Important When Deciding To Take Most Recent Cruise:</b>  Cruising is a good way to try out a vacation area you might want to return to	55	56	54
<b>Intend to return to same geographical area/destination for another type of vacation</b>	49	54	45

#### B. Among First-Time Cruisers

	Geographical Area/ Destination of Most Recent Cruise		
	% Total	% Caribbean	% All Other
<b>Agree With Statement:</b>  Cruising is a good way to try out vacation spots you may want to return to for a resort vacation	88	91	86
<b>Extremely/Very Important When Deciding To Take Most Recent Cruise:</b>  Cruising is a good way to try out a vacation area you might want to return to	62	67	58
<b>Intend to return to same geographical area/destination for another type of vacation</b>	49	55	44

\*Rated 4,5 on a 5-point scale where 5=agree completely and 1=disagree completely

Throughout this project, I conducted a survey with the objective of finding out about people's preferences in regards to cruises and other kinds of vacations in the Caribbean area. Over 100 people were surveyed, but only 52 met the requirement of having been to the Caribbean both in a cruise and also as a stay over vacation. The cities where the survey took place are Boca Raton, Coral Springs, Fort Lauderdale, Pompano Beach and Margate. It is important to note, then that the findings of this survey would obviously be different in a survey done on a national scale or in a different geographical area. Here is a sample of the survey:

SEX:                      M                      F

AGE:              UNDER 21              22-35              36-50              OVER 50

Have you ever been in a cruise to the Caribbean?                      Y                      N

Have you ever been on a land stay vacation in the Caribbean?              Y                      N

How would you rate a cruise vacation compared to a land stay vacation in the Caribbean?

a. better              b. worse              c. same              d. just different

Why? \_\_\_\_\_

The findings of the survey of the 52 chosen are as follows:

- 21 out of 52 or 40.4% are females, while 31 out of 52 or 59.6% are males.
- 13.5% of the people interviewed are under the age of 21;  
21.2% are from the 22-35 category;  
26.8% are from the 36-50 category; and  
38.5% are over 50 years of age.
- 61.2% of the people surveyed chose cruises over land stay vacations;  
12.3% rated cruises worse than land stay vacations;  
23.6% rated both vacation kinds as being the same; and  
2.9% rated them as just different.



Different reasons were presented to support the answers. The top three reasons for why cruises are better were:

- 1- The possibility to visit more than one island during the vacation
- 2- The great entertainment on board
- 3- The food

The top three reasons for those who prefer land stay vacations were:

- 1- There is more time to visit the island and experience its attractions and culture
- 2- Prefer to relax on a beach than in a ship
- 3- Enjoy going to different restaurants

The top three reasons for those who rated them as same were:

- 1- Both provide great relaxation
- 2- Both provide good entertainment
- 3- Both provide excellent food options

Those who rated them as just different did so because they could not find enough reasons to make a critical comparison among the two categories.

This survey comes to reinforce the idea that although both categories are enjoying success, the cruise line industry is definitely the leader of the pack. With an incredible big number of first time cruisers and also a great number of frequent cruisers, the cruise line industry will maintain its position as number one for years to come.

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